



KING wealth planning, inc.
Retirement is a Journey. Let us be your Guide.

Wealth Beyond Money:

Sharing the richness of your life with an Ethical Memoir

Reflect:

Name 3 people who are most important to you and why.

What are 5 words that you would like to have said about you?

Who has inspired me or made a difference in my life? How?

What are the greatest accomplishments I am most proud of? Why?

Your History:

What life stories are most vivid for you?

What were the turning points in my life?

What influences dominated my youth?

Who did I love to be with?

Is where you have lived meaningful in some way?

Your Values

Who are your heroes? Why?

What challenges/ "failures" / difficulties have you faced? What did it teach you?

What is it that motivates me?

What is the basis of my spirituality?

What are my most important values? How do they support my life?

Your Perspective

What could others learn from you to live a more meaningful life?

What mistakes would you like others to avoid? How?

What practical advice would you like to share with younger generations?

What important advice made a difference to get me to where I am today?

Your Feelings

What are you most grateful for?

Who would you like to grant forgiveness to?

Who would you like to seek forgiveness from?

Is there anything I want to resolve from my past?

What were the most pleasurable moments in my life?

Do I have any regrets? How would I like to resolve them?

What worries you the most about the future for yourself and the next generation?

Your Estate and Financial Plan

What are the benefits I hope my wealth decisions make?

What is the story of how I accumulated my wealth? What sacrifices or choices did I make along the way?

Who do I want most to help? How?

What are your most critical concerns with the transfer of your estate and money?

How do you want your money to be a force for good?
